



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 8/25/2000

GAIN Report #CA0127

Canada

HRI Food Service Sector

Hotel, Restaurant, Institutional Sector Report -

Western Canada

2000

Approved by:

Norval E. Francis, Jr.

U.S. Embassy

Prepared by:

B. Woodcock, USA Food Export, Inc.

Report Highlights:

The food service sector in Canada achieved sales of \$24.6 billion in 1999. This represents a 3.8% growth rate over 1998 sales of \$23.7 billion. This figure includes food, meals, snacks and beverages prepared in over 120,000 food service establishments in Canada.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Ottawa[CA1], CA

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SECTION I - MARKET SUMMARY - WESTERN CANADA

A) Value of Overall Food Service Sales in Canada

The food service sector in Canada achieved sales of \$24.6 billion in 1999 (Canadian Restaurant and Foodservice Association (CRFA) and Statistics Canada). This represents a 3.8% growth rate over 1998 sales of \$23.7 billion. This figure includes food, meals, snacks and beverages prepared in over 120,000 food service establishments across Canada.

Food service's share of the \$54.5 billion Canadian food industry (retail and food service) is 40%, with the Retail food sector making up the remaining 60% (source: Statistics Canada).

Food service, which is commonly defined as 'food prepared away from home,' is comprised of two key segments, commercial (restaurants and bars - where food preparation is the primary function of the business establishment) and non-commercial (accommodation and institutions - where the food preparation is secondary or incidental to the primary purpose of the establishment).

Commercial sales, as measured by Statistics Canada and the CRFA (Canadian Restaurant and Food Service Association), represent the lions' share of the sector at 78% or \$19.1 billion. Non-commercial sales are estimated by management consultants, KPMG and Pannell Kerr Forster at 12% or \$5.5 billion.



Canadian Food Service Sales	\$ US million Commercial	\$ US million Non Commercial	\$ US million Total Food service
1996	15,947	5,547	21,495
1997	17,039	5,422	22,462
1998	18,355	5,346	23,701
1999	19,136	5,462	24,598

B) Western Canada Food Service Sales

Regionally, Western Canada represented 34.6% of national food service sales, or \$8.5 billion in 1999. The other regions are represented by Ontario at 39.8%, Quebec at 19.3% and the Atlantic region at 6.4%.

Western Canada is slightly overdeveloped as it represents 33% of the Canadian population and 34.6% of food service sales. Among the Western provinces, British Columbia is still the most important food service market at \$3.9 billion.

The economic state of the individual provinces has direct bearing on Food Service growth, and is illustrated on the following chart. Alberta has seen a booming economy fueled by strong performances in its oil and financial sectors. British Columbia is, on the other hand, still recovering from the negative impact of the 1998 'Asian economic crisis' and the resulting lower GDP and Employment growth rates.

Province / % of National sales	1999 Commercial Food service in \$US	1999 Non Commercial Food service in \$ US	1999 Total Food service in \$US	Growth versus previous year
BC / 15.9%	\$3,040 million	\$868 million	\$3908 million	(-3.7%)
Alberta / 13.0%	\$2,470 million	\$710 million	\$3180 million	12.0%
Saskatchewan / 3.0%	\$ 557 million	\$158 million	\$715 million	5.7%
Manitoba / 2.8 %	\$ 541 million	\$153 million	\$ 694 million	5.8%

Source : Statistics Canada

C) Summary of the Food Service Sector Strengths - Opportunities and Challenges facing US Exporters in Western Canada

Advantages	Challenges
Large Market of 10 million Consumers in Western Canada (90% within 100 miles of the border).	A high level of concentration in Food Service Distributors in Western Canada
Sophisticated distribution infrastructure	The higher value of the US dollar adds cost to U.S. exports in Canada.
Imports are a well accepted fact of life for Canadian Food Service sector - dependence on international trade - especially with its number one trading partner - the U.S.A.	Distributor power, difficulty and high cost associated with gaining entry / listings, and sustaining support.
A common culture, with common eating habits, food trends, common restaurant and hotel chains.	Food Service predisposition to buy Canadian first means a unique competitive advantage is necessary.
N.A.F.T.A., free trade, and the elimination of tariffs on most food products.	Bilingual labeling requirements (French and English) on all consumer products and metric measurements on all products.
U.S . high value food products are well accepted by food service operators - especially those products filling unique needs and leading current food trends.	

D) Food Service Sector Structure in Western Canada

As mentioned above, the Western Canada food service sector has two dominant segments, the Commercial segment (restaurants and bars) and the non-commercial segment (hotels and other institutions). Within both of the key segments are the following sub-segments:

1. Commercial Sub Sector (78% of total food service sales)

a) Full Service Restaurants: This segment is the largest of the segments with 51% of commercial sales. Included are both establishments that are licensed to serve liquor (fine dining, family and informal dining) and unlicensed establishments (quick service restaurants that have seats). In the past several years the largest growth in the full service sub-sector has occurred among both family and quick service restaurants.

Note: The latest Crest Food Service Report by the NPD Group shows that quick service in 1998 represents 61.3% of all 'meal occasions' in Canada. The next closest segment is family at 16%, followed by casual at 12.8%, and fine dining at 1.8% (see section 'Trends' for more details on NPD trends in Canada).

b) Limited Service Restaurants: This segment (35% of commercial) does not serve liquor and provides very limited seating for guests.

c) Caterers: (7% of commercial) Contract Caterers - cater cafeterias in schools and hospitals. Social Caterers - cater for special events and offer premise catering.

d) Taverns: (7% of commercial) Pubs and taverns that serve food, however most sales come from alcoholic beverages.

Western Canada Commercial Sub-Segment Analysis - Sales by Segment

Commercial Food service Sales	1996 \$US millions	1997 \$US millions	1998 \$US millions	1999 \$US millions	4 year trend
Restaurants	4826.3	5139.3	5545.9	5703.7 (86%)	18.2%
- Full Service	n/a	n/a	3265.8	3375.9 (51%)	
- Limited Service	n/a	n/a	2280.1	2327.8 (35%)	
Caterer	366	427.5	434.2	445.3 (7%)	21.7
Tavern	279.6	329.1	420.4	463 (7%)	65.6
Total Commercial Food Service	5471.9	6029.	6400.2	6608.1 (100%)	20.8

2. Non Commercial Sub Sector (22% of Food Service Sales)

a) Accommodation - Hotels and Motels: This sub-segment, estimated at 43% non-commercial, represents all the food sold through hotels, motels, and resorts including fine dining, catering and quick service.

b) Institutional (31% on non-commercial) includes hospitals, prisons, schools, etc. that operate their own food service. It does not include the services that a contract caterer would provide (that is included under 'commercial - caterers').

c) Leisure Industry - (13% of non-commercial) includes movie theatre snack bars, ball parks, areas, etc.

d) Vending Machines - (3% of non-commercial) includes all food products sold through automatic vending machines.

e) Department stores - (3% of non-commercial) All food service sales through department stores, with the exception of areas leased or contracted out to commercial entities, caterers or unlicensed restaurants such as Subway.

E) Trends Impacting the Food Service Sector

1. 'Away from Home' Food Consumption - Home Meal Replacement

Western Canadians, like most other North Americans, increasingly suffer from 'time poverty.' Balancing a career and family life in a fast paced lifestyle has resulted in consumers having less time to shop for and prepare home meals. This has resulted in consumers spending a higher portion of their food dollars 'away from home' in the food service sector.

The latest national Statistic Canada figures show that personal expenditures on meals purchased outside the home accounted for 34.6% of food spending in 1998, up from 32.7% in 1989 – a healthy growth rate of 42.2%.

Western Canadians tend to spend more on 'away from home' eating than their counterparts in other areas of the country, as evidenced by the index of percent of Canadian restaurant sales to percent of Canadian population for key provinces in 1996 (source: Statistics Canada).

Key Province	Restaurant/Population Development Index
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British Columbia	1.31 (with Canada's highest per capita food service spending)
Alberta	1.03
Ontario	0.91
Quebec	1.07

2. Competition Between Food Service providers and Food Stores

Competition for the consumer's available food expenditure dollars has intensified between food /grocery stores and food service.

Food stores have recognized the trends and have attempted to defend their positions by trying to appeal to 'away from home' consumers, using a variety of retailing strategies:

- Home Meal Replacement - Sections of ready cooked or partially cooked meals for the consumer who do not have the time to spend cooking/shopping.
- Deli Sections - with a variety of precooked meals and salads for take out.
- In-Store Restaurants - including small franchise units (Subway, McDonalds, White Spot)

Of course restaurants are fighting back and targeting those 'time starved' consumers with more focus on fast food, delivery, take-out, and drive-through.

3. The Economy - Impact on Personal Disposable Income and Food Service

The state of the Western economy impacts personal disposable income, and ultimately food service expenditures by consumers. After an extended economic slump in the mid 1990's in the West and a delayed slump in British Columbia ('1998 Asian Economic crisis'), the Western economy is slowly recovering. Food service sales per capita are once again showing strong growth.

Also impacting consumers' disposable income and food service sales has been the escalating government tax rates, with the direct net effect being a 6% decline in disposable income between 1989 and 1998. However, that too, is being reversed as federal and most provincial governments are enacting significant tax reductions.

Today there is a much healthier economy in the West and consumers are responding by once again increasing their 'away for home' food expenditures.

4. Travel Industry and Food Service

The travel business in Canada is booming. With the Canadian dollar hovering at the 68cent level, family travel plans have been changing. Fewer Western Canadians are taking vacations 'abroad' or 'down south,' and more international tourists are being attracted by the favorable exchange rate and great travel values in Canada. Food service establishments targeting tourism are reaping the benefits of this tourism boom.

5. Cold plated / Ready to heat and serve / Par baked

Increasingly, food service customers in all segments are demanding partially baked food products that are easy to store, require limited heating before serving, and save considerable time and labor. Accordingly food service

product manufacturers and food processors are responding with an ever increasing array of such partially baked products which require limited preparation by food service establishments - just heat and serve.

6. Branded Food Service Product Appeal

In the restaurant sector menus are featuring more brand name products piggybacking on the popularity of branded products from the retail sector. Manufacturers who have a well recognized brand in the retail sector are increasingly promoting the value of their brand in the food service sector. This trend will no doubt continue as consumers in the current market become more conscious of brand-names.

7. Private Label Branding and Product Customization

Manufacturers and food processors are increasingly developing private label brands for key customers and distributors. Canada has a much higher level of retail private label development than in the U.S., and the trend has carried over into the food service sector. Probably even more important to some food service manufacturers is the trend toward customization of food products. Developing a unique niche and specialty products for individual customers helps to develop customer loyalty and competitive advantage.

8. Key Trends from the Crest Food Service Reports by the NPD Group (as presented in the Canadian Restaurant and Food Services Association 1999 Annual Food Service Facts publication)

a) Food Service Chain Restaurant Growth

- Chains increased their share of food service revenue to an all time high of 42% in 1997 (a 65% increase in sales revenue for these chains in 5 years).

b) Quick Service Restaurants dominate segmentation of restaurants

- Quick service restaurants represent a 61.3% share of meal occasions, followed by family at 16.0%, casual dining at 12.8% and fine dining at 1.8%.

c) Breakfast Meal Occasion - the fastest growing segment

- Breakfasts now represent 8.5% of meal occasions, the other segments include supper at 39.7%, and lunches at 29.2%. Snacks - morning, afternoon and evening make up the remainder at 7.8%, 8.7% and 6.1% respectively.

d) Drive-through and other off-premise restaurant sales growing

- Off-premise meal occasions share increases while on-premise shares decline.

Off-premise now represents 56.7% of meal occasions with take out, drive through and delivery growing. On-premise declined to 43.5% of occasions.

e) Away from Home versus At Home Meal Occasion by Venue shares

At home: 72% of meal occasions (comparable US statistics show a lower 69%)

Away from home: 14%

Carried from home: 7%

Skipped meal: 7%

f) Key food trends and their share of occasions

Top Foods of 1998		Top Drinks of 1998	
French fries	24%	Regular Coffee	23%
Unsweetened baked goods	12%	Regular Soft Drink	18%
Hamburgers	12%	Diet Soft Drink	5%
Salads	12%	Hot Tea	4%
Pizza	11%	Juice	3%
Sandwiches	9%	Milk	3%
Desserts	7%	Beer	3%
Ethnic Foods	5%	Wine	2%
Ice Cream	5%	Specialty Coffee	2%

SECTION II - ROAD MAP TO MARKET ENTRY**A) Entry Strategy**

Entrance into the Western Canadian food service market requires a good understanding of the Distribution system and a well organized and well financed 'go-to-market' plan to generate success.

The following are the key steps that are recommended by key industry experts:

- < understand the market
- < develop your 'go-to-market' plans
- < establish local sales expertise
- < create initial awareness and demand for your product
- < acquire a strong food distributor

1. Develop Local Market Understanding

Investigate specific market opportunities and limitations for your product by doing an environment scan.

Market - Size, segmentation, stage of development and similarity with the home market

Legal - Trade regulations, food inspection, packaging and labeling, etc.

Competition - Who are the current key suppliers and what are their strengths and weaknesses?

Social - What are the key market trends relating to consumer demand for your food product; similarities and differences to the home market?

2. Develop Local Sales and Marketing Expertise

A successful entry into the Western Canada market will require careful sales and market planning. Local sales and marketing expertise can be developed internally through building a traditional manufacturer sales force, or externally by establishing a manufacturer's agent / broker sales arrangement. Local sales expertise will be required to guide the product through the various hurdles of market entry, from key customer and distributor introductions and presentations, to facilitating initial distribution, to managing the ongoing market and customer programs.

3. Develop Initial Awareness

In order to develop awareness of your product in the new market, it is recommended that a concerted effort be made to create product awareness with customers and distributors. There are two accepted ways to develop initial awareness:

- < Food Service Trade Shows - A booth hosted by your own sales staff and/or your food service broker. There are two key food service trade shows each year.
 - < BC Food Service Trade Show - March 4, 5, and 6, 2001 in Vancouver
 - < Alberta Food Service Trade Show - May 3 and 3, 2001 in Edmonton
 - < Contact : Heather Angeard - trade show planner 1-800 663-4482
- < 'Show and Tell' presentations to distributor sales departments - a great way to spread the word about your product. For example, at Serca Foods, Western Canada's largest food service distributor, the following procedure exists: (other distributors e.g., Conings have similar opportunities)
 - < First step is to present to the 'merchandising manager' who then at his discretion invites the sales managers to your show and tell presentation for your new product.
 - < Upon successful listing of the new product and at the discretion of the sales managers, show and tell presentations for new innovative products can be made to the sales force at their sales meetings (three times annually).

4. Develop Initial Demand

Success in the food service market normally requires your product to be listed with one of the key food service distributors. Distributors, however, typically do not take on new food service products until these products have proven themselves in the local market. A recommended entry plan is to first develop initial market demand. This can be done by going directly to a key food service customer and working with them to put your product on an extended trial.

As an alternative, food service manufacturers can develop a distribution and sales track record by marketing their products through the warehouse club channel (e.g., Costco).

Either way, with a successful and proven track record, key distributor listings are easy to obtain. Ultimately this is what will drive food service product success.

5. Develop a long term arrangement with a Food Service Distributor

Distributors are important in the food service channel of distribution for most products. Due to the relatively small size of the individual food service customer/outlet, distributors play the key facilitating role of storing, breaking down quantities, consolidating orders and delivering orders on a 'just in time' basis.

B) Market Structure

The food service market in Western Canada has a highly sophisticated distribution system. Market entry and ongoing success in this sector usually requires utilization of the market's local specialist, facilitators, distributors and brokers. While some commercial food service establishments purchase some specialized foods directly from food processors and producers, the majority use distributors and brokers. It is estimated that about 23% of food service requirements are shipped directly from processors, 75% use distributors / brokers, and 2% through cash and carry / warehouse club outlets.

1. Distributors (see list of key distributors in appendix)

The key logistical link between food service manufacturers and customers these channel intermediaries take over most of the distribution functions within the channel. These intermediaries represent food manufacturers and processors by purchasing inventory, warehousing and selling food products locally. They have their own sales force and fleet of trucks. Most distributors in Western Canada are regional in scope, with only one being truly national: Serca - Canada's largest distributor with over \$1 billion in sales.

Some distributors are full service, offering a broad range of services and representing a wide variety of products, while others are limited or short line, having a somewhat smaller range of services and carrying a narrow line - e.g., specializing in meats, vegetables, or seafood.

All distributors are members of buying groups to gain the benefits of group buying. The key buying groups are ITWAL, Associated Food Distributors, and Emco and Grouper (see Food Service Buying Groups section for contact information).

Distributors have their own sales force and limited marketing staff looking after periodic advertising and promotional programs. Their focus, however, is on the sales side, developing and maintaining the relationship between food service customers and the products they represent.

2. Brokers / Manufactures Agents (see list of brokers in the Appendix)

Brokers are the sales and marketing arm of any food service manufacturer, providing local sales and marketing knowledge to help in the planning and execution of market activities. The range of Western brokers available to food service manufacturers is considerable. Brokers are varied to fit the different strategic needs of the food service principal. Some brokers provide limited distribution services as well, perhaps importing a small or specialty food service product line and performing limited channel functions, storing and distributing.

3. Food Service Customers

While there are over 40,000 food service outlets in Western Canada, the chains, and their associated franchisees, dominate the independents. Restaurant segment chains represent an estimated 40% of the number of outlets but over 60% of restaurant industry sales. The percentage is higher still in the quick service restaurant segment.

As explained in the first section of this report there are two main segments, the commercial segment, for whom food service is their main business, and non-commercial for whom food service is secondary to their key business focus (accommodation, government institution, etc.).

In Western Canada the key commercial segment is broken down into sub-segments as follows:

a) Commercial

- Restaurants

Quick Serve	e.g., McDonalds - Western HO in Vancouver
Family/Midscale	e.g., White Spot Ltd - 53 chain restaurant HO in Vancouver
Casual	e.g., The Keg chain - HO Vancouver
Fine Dining	e.g., The Cannery - HO Vancouver

- Caterers

e.g., Regency - HO in Vancouver

- Taverns

e.g., Misc. local establishments

b) Non Commercial

- Accommodation

e.g., Coast Hotels - 17 Hotels - HO Vancouver

- Leisure

e.g., Various Resorts, and on the BC Coast... the Cruise Ship Lines

- Other

e.g., Vending and Retail - e.g., The Bay Department Store Cafeteria

- Institutional

e.g., Government - Educational Institutions, and Hospitals

Non-Commercial Sub-Segment Distribution System

As with the commercial sub-segment, the non-commercial sub-segment derives the vast majority of its food supply through distributors / brokers. While no estimates are available for the percentage of sales going through brokers, like the commercial segment, the majority would go via this channel.

The non-commercial segments are typically made up of customers with limited storage space. As a result of this situation the importance of a distributor's ability to make frequent and 'just in time' deliveries becomes very important for many food service customers, especially institutional.

SECTION III - COMPETITION

The Eastern and Western Canada food service markets have different orientations when it comes to import sourcing. In Eastern Canada that orientation is naturally a combination of Europe and the U.S. In the West there is little orientation to Europe and a much closer relationship with U.S. market import sourcing. Food service customers and distributors in the West say that while there is a preference to buy Canadian and local, imports from the Western U.S. enjoy strong favor and preference. There are a number of reasons for the dominance of the U.S. as a source of food products for western Canada:

- < Proximity (90% of the Canadian population is within 100 miles of the US border)
- < A similar culture, eating habits and food trends - especially West Coast trends
- < Short growing season for fruits and vegetables in Canada
- < Common restaurant and hotel chains
- < Generally higher levels of food production efficiency in the U.S.
- < Similar social trends driving food demand, including time poverty

And now more than ever, imports from the U.S. enjoy competitive advantage as a result of N.A.F.T.A., which resulted in the elimination of import duties for most products.

Some evidence of the strengthening trade competitiveness:

- < Canned fruit and vegetables imports from the U.S. climbed 8.8% to \$451.2 million in 1997. (Canned fruit imports amount to 88% of domestic consumption).
- < Fruit and vegetable juices from the U.S. rose to \$185 million or 61% of total imports into Canada.
- < Fresh vegetables imported from the U.S. rose to \$500 million due to the short growing season in Canada, the rise in healthy eating and the influx of Asian immigration. Imports of fresh vegetables into Canada have risen as a percentage of total consumption from 33% to 39% in 8 years.
- < U.S. products enjoy a relatively strong competitive position, as evidenced by the following table showing the competitive position of the U.S. relative to the rest of the world. The table also shows the percentage importance of imports in total domestic consumption in each food category.

Product Category (Food Service and Retail Combined)	Canadian Imports from the U.S. \$US millions	Imports from the Rest of World \$US millions	Imports as a % of Total Canadian Food Consumption
Frozen Fruit / Veg	145	117	26%
Fish	275	669	45%
Poultry	141	7	7%
Meat Products	533	212	11%
Canned Fruits / Veg	451	261	26%
Dairy (ex milk)	54	133	5%
Prepared Flour Mix	82	3	11%
Bread and Bakery	127	9	8%
Dry Pasta	23	29	26%
Tea and Coffee	147	138	14%
Biscuits	87	53	14%
Sugar and Chocolate snacks	265	213	30%

Source: Statistics Canada

References

1. NPD Food Service Digest - Crest Market Reports and NPD Weekly News Bulletin - Industry News and Trends, E-mail: npd_digest@npd.com - Contact: Carole McNutt
2. BC Restaurant News -Western Canada Trade Magazine - Published by Mercury - Contact: Editor - Teresa Evans, Phone: (604) 731-1739
3. Food Service Facts - Market Review and Forecast 1999 - published by the Canadian Restaurant and Food Service Association. Contact: Chris Elliott, Economist
4. Food in Canada - National Trade Magazine - Published by Maclean Hunter, www.foodincanada.com
5. Profile of the New Canadian Consumer: Demographic and Economic Situation, Marketplace Behavior and Buying Patterns. Agriculture and Agri-Food Canada - March, 1999 - www.agr.ca/food
6. The Food Marketing and Distribution Sector in Canada - Agriculture and Agri-Food Canada - April, 1999 www.agr.ca/food
7. Food Services Competition in Canada - Statistic Canada - April 14, 2000 - Stats Can Vancouver Office Phone: (604) 666-7802

List of Food Service Brokers

Top 4 Food Service Brokers

1. International Pacific Sales (Large food service broker)
22111 Fraserwood
Richmond BC, V6W 1J5
Contact : Gary Weir
Phone : 604 - 273- 7035
2. Pennine Marketing Ltd. (Medium sized food service broker)
#100 10277 154th St.
Surrey BC, V3R 4J7
Contact : Derek Pope (owner)
Phone : 604 - 585- 4455
3. Summit Marketing (Medium sized food service broker)
#8 62 Fawcett Rd.
Coquitlam BC V3K 6V5
Contact : Doug Spenser
Phone : 604 - 523-0332
4. Preisco Jentash (Medium sized food service broker / distributor)
91 Glacier St.
Coquitlam BC, V3K 5Z1
Contact : Rick Lawrence (VP)
Phone : 604 - 941- 8502

Other Food Service Brokers

1. Teese and Persse Brokerage Ltd (Large grocery and food service broker)
#101 - 827 Belgrave Way,
Delta BC, V3M 5R8
Contact : Doug Laurence (pres.)
Phone: 604- 520-6002
2. CYBA Stevens Mgt Group (Large grocery and food service broker)
#100 - 3016 19th Ave,
NE Calgary, T2E 6Y9
Contact : Boyd Stevens (Pres.)
Phone : 403- 291-3288
3. Contact Management Group (Medium sized grocery & food service broker)
#2022 - 7445 132nd Street
Surrey BC, V3W 1J8
Contact: Terry Johnston (partner)
Phone : 604 - 572- 8686

4. Tier 1 Services Inc. (Medium sized grocery & food service broker)
91 Glacier St.
Coquitlam BC V3K 5Z1
Contact : Ross Hughes (Pres.)
Phone : 604 - 514- 0402

5. Concord National Inc. (Medium grocer & food service broker)
303 Mountain Hwy,
N. Vancouver BC, V7J 2K1
Contact: Tim Moore (F.S. Manager)
Phone: 604 - 986- 7341

6. Cambrian Enterprises Ltd (Small food service broker)
7 - 915 McLeod Ave
Winnipeg, Manitoba, R2G 0Y4
Contact : G. Adams
Phone : 204 - 667- 3434

List of Food Service Distributors

Top 5 Food Service Distributors

1. Serca Food Services Inc. (Large food service distributor)
1700 Clivenden Ave,
Annicis Island BC V3M 6T2
Contact : John Kapinski (food service manager)
Phone : 604 - 540 - 3701
2. Sysco Coning Wholesale_ (Large food service distributor)
1346 Kingsway
Port Coquitlam BC V3C 6G4
Contact: Bob Clewlow
Phone : 604 - 944- 4410
3. Bridge Brand Food Service (Large food service distributor)
1802 Centre Ave
Calgary Alberta T2E 0A6
Contact: Fred Tamaagi
Phone : 403 - 235- 8555
4. North Douglas Distributors (Large food service distributor)
602 Barbon Place
Victoria BC V8Z 1C5
Contact : Terry Parsons
Phone : 250 - 475- 3311
5. National Importers Ltd. (Medium sized grocery and food service broker/distributor)
1376 Clivenden Ave Annacis Business Park,
Annacis Island BC,
Contact : Terry Johnston
Phone : 604 - 520- 1555

Government Agencies

1. Food Bureau

Market and Industry Services Branch

Agriculture and Agri-food Canada

Fax: (613) 759-7480

Web: <http://www.agr.ca/food>

2. Alberta Agriculture, Food and Rural Development

Contact : Darcy Willis

Phone: (780) 422-2252

Web: <http://www.agric.gov.ab.ca>

3. BC Agriculture and Food

Mailing: PO Box 9120, Stn Prov Govt

Victoria, BC V8W 9B4

Location: 808 Douglas St.

Victoria, BC

Phone: (250) 387-5121 or 1-800-663-7867

Web: <http://www.agf.gov.bc.ca>

4. BC Statistics

Contact : George Dufour

553 Superior St.

Victoria, BC V8V 1X4

Phone: (604) 387-0376

5. Industry Canada

2000-300 West Georgia St.

Vancouver, BC V6B 6E1

Phone: (604) 666-5000

Web: <http://strategis.ic.gc.ca>

Associations

1. BC Restaurant and Foodservice Association

Contact : Simon Evans, President

#140 - 475 West Georgia St.

Vancouver, BC V6B 4M9

Phone: 1-800-663-4482

E-mail: service@bcdfa.com

2. Canadian Food Broker Association

Contact : Keith Bray, President

100-58 Meadow brook Lane

Unionville, ON L3R 2N9

Phone: (905) 477-4644

Web: <http://www.cfba.com>

3. Canadian Restaurant and Food Services Association

Contact : Chris Elliott

316 Bloor Street West

Toronto, Ontario M5S 1W5

Phone: (416) 923-8416

E-mail: info@crfa.ca

4. Canadian Produce Marketing Association

Contact : Patrick Labrecque, President

4310-1101 Prince Of Wales Dr.

Ottawa, ON K2C 3W7

Phone: (613) 226-4187

5. Food and Beverage Canada

17313 107 Ave.

Edmonton, Alberta T5S 1E5

Phone: (780) 486-9679

6. Food and Consumer Product Manufacturers Of Canada

Contact : George Fleishman, President

Phone: (416) 510-8024

7. BC Council Of Marketing Boards

2509 Vancouver St.

Victoria, BC V8T 4A6

Phone: (250) 383-7171

Contact : Andreas Dolbert

8. BC Food Brokers Association

Contact : Doug Lawrence, President

Phone: (604) 520-6002

9. BC Produce Marketing Association

Contact : Walt Breeden, President

Phone: (604) 268-1890

10. BC Frozen and Chilled Foods Association

Contact : Stu Spear, President

Phone: (604) 421-4242

11. Alberta Food Brokers Association

Contact : Gerry Poissant, President

Phone: (403) 253-4488

12. Alberta Food Processors Association

Contact : Ken Gibson, President

Phone: (403) 444-2272

Food Service Buying Groups:

Grouplex

194 River Side Circle SE

Calgary Alberta

Phone : (403) 259-4100

ITWAL Ltd.

440 Rail Side Drive

Brampton Ontario L7A 1L1

Phone (905) 840-9400

Associated Food Distributors

200 Davis Dr.

New Market Ontario L3Y 2N4

Phone: (905) 898-5383

Emco

224 61stAve SE

Calgary Alberta T2H 0R3

Phone : (403) 252 6621

Find Us on the World Wide Web:

Visit our headquarter's home page at <http://www.fas.usda.gov> for a complete listing of FAS' worldwide agricultural reporting.

Contact FAS/Ottawa by e-mail: usagr@istar.ca

Contact USA Food Export, Inc., Brian Woodcock by e-mail: woodcock@istar.ca

Related FAS/Ottawa reports:

Report Number	Title of Report	Date
CA9016	Marketing In Canada	2/18/99
CA9141	Food Product Export Opportunities in Western Canada	12/23/99
CA9142	Western Canada Retail Study	12/23/99
CA0001	Eastern Canada Retail Study	1/05/00
CA0004	Bakery Products I: Sweets	1/20/00
CA0006	Bakery Products II: Bread, Rolls, etc.	1/24/00
CA0007	Food Product Export Opportunities in Eastern Canada	1/31/00
CA0022	New England Culinary Institute	2/29/00
CA0030	WUSATA Recruits Grocery Showcase West	3/21/00
CA0032	Agent/Distributor Directory -Eastern Canada	3/21/00
CA0047	Hotel, Restaurant, Institutional Foodservice Sector Report - Eastern Canada	4/19/00
CA0050	Agent/Broker Directory - Western Canada	4/19/00
CA0081	Food Product Export Opportunities in Eastern Canada - Report II	6/20/00
CA0082	Canada Connect (Matchmaker Program)	6/26/00
CA0112	Wine & Spirits Promotional Opportunities	8/9/00
CA0113	Food & Beverage Promotional Opportunities	8/9/00
CA0114	Livestock Promotional Opportunities	8/9/00
CA0115	Pet Show Promotional Opportunities	8/9/00
CA0116	Poultry Show Promotional Opportunities	8/9/00

CA0116	Nursery Product Promotional Opportunities	8/9/00
CA0118	Wood Product Promotional Opportunities	8/9/00